

This guidance is under review in light of the Supreme Court judgement in *For Women Scotland Ltd v The Scottish Ministers*.

Transitioning at Work: Guidance for Staff and Managers

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Introduction

The guide is for members of staff who are transitioning at work. Guidance for your line manager can also be found in section two and we encourage that before you meet with your line manager you read this guidance in conjunction with the *Transitioning at Work Policy*. The guidance presented here has been created to assist you with some of the practical issues that may be related to transitioning in the workplace.

You may also find it helpful to read the two key pieces of legislation that provide more details about the legal protections for trans people; the [Equality Act \(2010\)](#) and the [Gender Recognition Act \(2004\)](#).

As outlined in our *Transitioning at Work Policy*, the University recognises that work-life is a major part of your transition and having a working environment where you feel valued and supported is essential. The University is committed to ensuring equality of opportunity for trans and non-binary members of staff and to supporting those who are transitioning. The University will ensure that your workplace is a supportive environment without fear of prejudice, discrimination or harassment.

Throughout this guide we use the terms trans to refer to a range of individuals with different needs, wishes and experiences but who may have similarities in the transitioning process. Some of these people may identify as transgender, trans or non-binary. As transgender is often used and recognised as an umbrella term for different gender identities, it is used in this guide as it allows us to be more inclusive in terms of who this guide is for.

Separate guidance is available from the [Student Life Centre](#) for students who wish to or are transitioning. If you are a doctoral student you may want to consider speaking to your supervisor to discuss your transition. If this is not something you would like to do you could also contact the Student Life Centre who will be able to provide you with advice. If you are a doctoral student who is also employed at the University, for example, as a doctoral tutor you may consider speaking to your line manager, if they are not your supervisor. Ultimately, who you decide to discuss your transition with is your choice.

Staff members and line managers may also find it use to consult a [glossary of terminology](#) containing some of the terms used in this guide.

Section 1: Transitioning at the University

If you have taken the decision to transition at work, it is completely up to you how you would like to transition. The specific actions that you, your line manager and the University will take to enable this will reflect how you choose to transition. This guidance recommends that if you notify your line manager about your transition, this could be via email or a face-to-face conversation, that you read *Transitioning and Work Policy* and this guidance. Section 2 deals specifically with the role of your line manager in supporting you.

This section of the guidance provides you with information about key considerations for managing your transition such as changing records, how your absences (if you need to take any) will be recorded and advice about informing people you work with. It also provides advice about having an initial meeting with your line manager to discuss your transition and some frequently asked questions.

1.1 Telling your Line Manager about your transition

A good working relationship between you and your manager is important in order for you to feel supported. Having a good working relationship can open up possibilities to discuss the practical aspects of your transition, what support you need and creating and implementing your transition plan if you chose to use one. Discussing your transition with your line manager will help both of you be clear about what changes need to be made and who is going to take responsibility for these changes.

While we recommend that you speak to your line manager about your transition, if you do not feel able to do this you may decide that you want someone who is not your direct line manager to support you. You may wish to discuss your transition with somebody at the University before you speak to your line manager and/or choose another colleague in your School/Division to have a role.

Before informing your line manager you may wish to contact the relevant [Human Resources Business Partner \(HRBP\)/Associate \(HRA\)](#). It may be the case that you decide to contact HR first who can then act as a point of contact and, with your consent, contact your line manager on your behalf to inform them of your decision. Your HRA will be able to provide information and can coordinate certain steps of the transition process such as changing records in other divisions of the University.

It is your decision about the steps you would like to take as part of your transition and for you to tell your manager what you envision their role to be. For example, you may want your manager to take an active role in supporting you or just to provide the support required for certain changes. Either way, it is important that you have control over the decision-making process of your transition and your line manager will take your steer on the role they should play.

Although it is your decision whether or not you speak to your line manager, if the support you require entails a change to your job roles, workplace adjustments and/or absence you will have to discuss this with your line manager.

There are a number of aspects that may be part of your transition at the University which you may want to consider:

1.1.1 Records

All members of staff are entitled to have some of their workplace records changed to reflect the name, title and gender that they use and identify as.

You can change your name on your web profile, University email address, Library and ID card, access pass card and some of your HR records. To do this you can contact your [Human Resources Business Partner \(HRBP\) or Human Resources Associate \(HRA\)](#) for your School/Division who will be able to support you with this.

If you are also a student at the University, then you should inform your HRBP/HRBA about this as they will also be able to provide support in how you can have your student records changed.

1.1.2 Payroll, Pensions, National Insurance and Benefits

While changes in name and pronouns can be reflected in some HR records, there are some records that you cannot have amended to reflect your gender identity without a new birth certificate issued through a Gender Recognition Certificate (GRC). These include payroll, pensions, National Insurance and tax-records.

Amendments to these records cannot be made because the University needs to comply with legislation and hold the legal sex that is on your passport. Part of the University's compliance is that it must complete a statutory return to HMRC about the legal sex of members of staff on the University payroll. These records will be handled confidentially and their use is limited to purposes for payroll activities.

If you do have been issued with a new birth certificate then you should speak to your HRBP/HRBA about having your payroll, pensions, National Insurance and tax-records amended.

Your transition does not affect the range of [benefits and rewards](#) provided to you as a direct result of being employed by the University.

1.1.3 Absence from work

During your transition you may or may not need to take time off for appointments or medical procedures. These may be short periods of time such as a day or an afternoon to attend an appointment and these should be granted on request of your line manager.

You may also need to take longer periods of absence. If an absence is planned in advance you can discuss this with your line manager about the time you will need off and what this means for your role and whether working adjustments will benefit you.

Sometimes, this may not be the case. But any long-term absences directly related to your transition would not be expected to trigger action under the formal stages of the absence management policy and you will not be treated less favourably in having such times off.

1.1.4 Dress Code and work wear

The University has a gender-neutral approach to dress code. We do not have a formal dress code policy. All staff members can dress as they wish, and we fully support trans and non-binary staff to dress as they wish. Where a staff member is required to wear a uniform, staff members can choose which uniform they would like to wear. Where staff require more than one uniform, for example for genderfluid staff, the University will ensure that the staff member has access to the uniforms as soon as possible when requested.

During your transition you may wish to wear clothing that reflects your gender identity from a particular date. It is your choice about how and when you want to do this.

1.1.5 Telling colleagues

For you, it may be important to tell all or some of your colleagues about your transition and gender identity. It is up to you who you would like to tell and how you will communicate this to them.

You can discuss this with your line manager if you wish. It may be the case that you want to email your colleagues, or you would like your manager to do this on your behalf. Either way, you can work together to discuss who you want to tell, what you want them to know, how you want to communicate, who will do it and when. You may also opt to not inform other colleagues and that is your right not to do so.

1.1.6 Telling customers, clients and students

It is also your choice what you would like to share with customers, clients and students. For example, you may wish to share information about how you would like to be addressed.

1.1.7 Role specific changes and the working environment

Although there is no reason why you cannot continue your job role, you may feel that you would like to change your role in the organisation for a while or permanently. If this is something you would like to consider you should speak to your line manager (in conjunction with HR) about how to accommodate these changes if possible.

If you feel that flexible working may be of benefit to you during your transition you may want to apply for flexible working under the [Flexible Working](#) procedure and speak to your line manager about this.

1.2 Finding support

If you need support outside of that provided by your line manager and HRBP/HRA, you may want to consider other places where you can get support from. These may include:

- **Trades Unions:** the campus trade union; [Sussex UCU](#) (local branch), [UNISON](#) (local branch) and [UNITE](#) (for technical and technical related staff) can offer work related support and guidance.
- **LGBT+ Staff Network:** made up of LGBT+ members of staff the network can offer support and holds a termly social meet up.

- [Trans and Non-binary Staff Network](#): is a confidential and fully inclusive group and is open to all members of staff (including postgraduate researchers) who identify as trans and/or non-binary.
- [Occupational Health](#): offers advice on health and well-being at work covering a wide range of services including health promotion, referrals for counselling and return to work assessments
- [Employee Assistance Programme](#): provides a confidential and self-referral service for all staff and can help with a range of difficult issues that you may be experiencing.

1.3 Meeting with your line manager

Having a meeting with your line manager to discuss your transition will give you both an opportunity to talk through the support you need. How you do this is your decision. For example, you may arrange a meeting to tell them about your transition and then have a follow up meeting where you can both discuss the transition in more detail. The timings of these meetings and what will be discussed is up to you, but you may want to consider using the transitioning at work plan in Annex 1.

If you have decided to inform your HRBP/HRBA in the first instance, then you should work with them to discuss how you would like to communicate your transition to your line manager if this is necessary.

Section 2: Guidance for Managers

2.1 Role of the Line Manager

'Transitioning' is a term that describes the steps an individual may take to live as the gender they identify with. Every person's transition is unique and will involve different things. For some trans and non-binary staff members, the process of transitioning may involve medical procedures and for others it may not. Transitioning may involve telling friends, family, colleagues and students they teach, dressing differently from how they dressed before, and changing titles, names, pronouns and/or official documents.

Your role as a line manager is important for trans and non-binary staff in that it should help foster a working environment that is safe and supportive and one where there is a positive working relationship between you and your direct reports.

As a line manager you may already have experience in supporting a staff member through their transition. There is no 'right' or 'wrong' way to transition and it is important to remember that transitioning is personal and will be different for each individual and it is up to them which steps they would like to take to transition in the workplace.

Gender identity is an important part of who someone is and something that they may wish to share with people around them. How someone chooses to identify their gender is their choice and you and other colleagues should use the name, pronoun, title and gender identity the person has asked to be referred by.

To help you support the staff members you should read the *Transitioning at Work Policy*. While your role is to provide support, there may be some administrative aspects of your staff member's transition that they would like you to take action on.

How involved your role will be in a staff member's transition will be determined by them and it is okay to ask them what they envision your role to be. During your discussions with the staff member it is fine to ask questions about how they would like to transition at work, about potential absences and changing records. However, it is not appropriate to ask probing questions or questions that are insensitive.

As outlined in our *Transitioning at Work Policy* where the term 'trans' is used it refers to an umbrella term. Trans people may describe themselves using one or more of a wide variety of terms including (but not limited to) transgender, transsexual, gender-queer (GQ), gender-fluid, non-binary, gender-variant, crossdresser, genderless, agender, nongender, third gender, bi-gender, trans man, trans woman, trans masculine, trans feminine and neutrois.

2.2 Support for Line Managers

If a staff member has informed you about their transition or you are due to meet with them to discuss it, you should consider what support you both need.

With the consent of the staff member you can contact the relevant [Human Resources Business Partner \(HRBP\)/Associate \(HRA\)](#) who will be able to provide you with support. In doing so, you should do this with consent of the staff member. The HRPB/HRBA can act as point of contact with HR and with the consent of the employee can coordinate certain steps of the transition process such as changing records.

It is okay to seek support from HR in general about transitioning but it is important to remember that you should never disclose any information about a staff member's gender identity, gender history or transition without their consent.

2.3 Providing Support

A key aspect of your role is to offer ongoing support to your member of staff and help deal with any issues they may encounter. You should consider the best way for you to state and demonstrate the University's and your own support and discuss these with your staff member. Below are just some examples of what may be required of you.

2.3.1 Telling colleagues and others you work with

A staff member may ask you to communicate with their colleagues about their transition, e.g. pronoun changes, University's expectation of dignity and respect in the workplace. You should discuss with your staff member what role they would like you to have in communicating their transition to other people they work with. Together you should consider who they would like you to tell. This could be customers, clients and students they teach.

2.3.2 Role specific changes and the working environment

Although there is no reason why a person cannot continue to work directly with colleagues, clients and students they may feel that they would like to change their role in the organisation for a while or permanently. If this is something that your staff member would like to consider it is good practice for you (in conjunction with HR) to consider and accommodate these changes if possible.

Your staff member may feel that flexible working may be of benefit to them during their transition. If so, you should discuss the [Flexible Working](#) policy and procedure with them and discuss whether you can accommodate their requests for flexible working.

2.3.3 Administrative Support

Your staff member's transition may mean that a number of records need to be amended. Annex 2 provides a list of records that may need amending or changing. As the line manager you may need to take the lead on actioning these changes if the staff member has requested you to do so. If they have, you should discuss this with your staff member and, with their consent, seek support from HR where the HRBA will be able to act as a point of contact to have different records changed. The

HRBA acting on behalf of your member of staff for these changes can be helpful to an individual as they do not have to discuss their transition with several administrative areas to get changes made.

Remember some of your staff member's personnel records that will need to be changed may be held in your School/Division as well as their web presence on your internal and external webpages. You can discuss with your staff member about making amendments to these records. Your member of staff may ask for you to provide support or take the lead in having these changes made. If they do request your help it is part of your role, with their consent, to ensure these changes are made. It may be the case that the staff member will want to lead on having these changes made without your intervention. It may also be helpful to discuss the different types of personnel records your School/Division hold such as annual leave and flexi-time records, sickness and training records.

2.3.4 Absences

During their transition a staff member may or may not need to take time off for appointments or medical procedures. These may be short periods of time such as a day or an afternoon to attend an appointment or longer periods of time.

If possible, it is advised that you discuss any required time off they need and refer to section 4.5 of the Transitioning at Work Policy to manage longer periods of absence.

Sometimes, a staff member may not need a longer period of absence but if they do these would not be expected to trigger action under the formal stages of the absence management policy.

Frequently asked questions for staff members who are transitioning and line managers

Seeking support:

Q: Where can I get confidential advice or support around transitioning at the University?

A: There are a number of options if you wish to speak to someone confidentially. This could be your line manager or the HR Business Partner or Associate for your area. If this is not appropriate for you, you can contact the Employee Assistance Programme or Occupational Health. The Trans and Non-Binary Staff Network will also be able to sign post you to support.

For Line managers: Initially, you should read the Transitioning at Work Policy and this guidance. It is important that you consult with your colleague before contacting HR and ensure they have given you consent to do so. **With the consent of the staff member**, you can contact the relevant [Human Resources Business Partner \(HRBP\)/Associate \(HRA\)](#) who will be able to provide you with support. It is okay to seek support from HR in general about transitioning but it is important to remember that you should never disclose any information about a staff member's gender identity, gender history or transition without their consent.

Q: I wish to transition or am in the process of transitioning, who do I need to contact within the University?

A: It is your decision who you would like to contact first. You can choose to contact the [HR Business Partner](#) for your area or your line manager, or both. They will be able to support you.

Changing records:

Q: What records do I need to consider having changed?

A: There are a number of records that you may want to have changed or amended as part of your transition. These include: personnel records (HR), admin records your School/Department might have, student records if you are also currently studying at the University. You may also want to change your ID, IT details such as your email address, room name plates, School/Division photo displays of staff and references to you on your School/Division webpages.

Annex 2 provides a list of records that may need to be amended or changed.

Q: How can I change my name with the University?

A: You can contact your [HR Business Partner or HR Business Services](#) who will help in changing your name on your HR record. You should also discuss this with your line manager who will also be able to offer support in doing this.

Changing records:

Q: Can I change the gender or title on my records?

A: Yes, but not on your payroll records unless you have a gender recognition certificate. You can have your affirmed gender and title included on personnel documents and your web profile. However, we are unable to change the gender on your payroll records as we have to statutorily return the sex that is used on your birth certificate. If you have a birth certificate in your affirmed gender then we are able to change these payroll records.

Q: Can I change my ID and email address?

A: Yes, you can have your staff ID and email address changed to reflect any name changes. You can speak to your [HR Business Partner](#) who will be able to help you do this.

Absences:

Q: How will time off for appointments be dealt with?

A: Currently staff are able to take time off from their working day for appointments (such as G.P, attending hospital). Any absences such as these relating to transitioning should normally be granted on request of the line manager.

Q: How will long term absences be dealt with?

A: Where a staff member needs to take a leave of absences that is directly related to transitioning or as a result of relevant medical treatment or ill health, they should consult with their line manager and the relevant processes outlined in the University absence management policies. Such time off would not be expected to trigger action under the formal stages of the absence management policy.

Official documentation:

Q: Can I obtain a DBS check without disclosing my trans status?

A: Yes, the DBS service has a specific procedure for a trans person to obtain a DBS check which does not reveal their former name and gender they were assigned at birth. This is known as a sensitive application and the individual would need to contact the DBS directly in respect of this. Where there are no convictions recorded, any details of other names provided direct to the DBS will not be revealed to the University.

Q: Do I need a Gender Recognition Certificate?

A: It is completely your decision whether you want to apply for a gender recognition certificate (GRC). Not having a GRC will not disadvantage you as a trans person working at the University. A GRC is not needed in order for you to transition at work.

For Line managers: Not all trans people apply for a GRC and there is no requirement for them to have one. Not having a GRC must not be used to disadvantage a trans person. Asking to see a GRC is not acceptable.

Benefits and entitlements:

Q: What about my pension and taxes?

A: Very few staff will be affected by a different state retirement age that will affect their pension. However, advice from Pensions may be required and it is important to remember to ensure any name or title and gender identity changes are completed with your current pension provider.

Q: Will any of my benefits working at the University change?

A: No, transitioning will not affect any of the workplace benefits you are entitled to as a member of staff.

Dress code and work wear:

Q: Does the University have an official dress code?

A: No, the University has no official dress code or provides any guidance about how staff should dress in the workplace.

For Line managers: You should advise staff on whether your School/Division has any restrictions on clothing, footwear etc for health and safety reasons.

Q: Am I allowed to dress to match gender identity/gender expression?

A: Yes, the University has a gender-neutral approach to dress code. We do not have a formal dress code policy. All staff member can dress as they wish, and we fully support trans and non-binary staff to dress as they wish. If you have any questions regarding this, you could speak to your line manage.

Campus facilities:

Q: Can I use the toilets that match my gender identity?

A: Yes, any staff member can use the facilities that align with their gender identity. Where single sex facilities are available, staff members can use those which correspond with their gender identity. Trans and non-binary staff members will never be asked to use accessible or unisex facilities exclusively. If a staff member feels that have been subjected to bullying and harassment they can seek to address this at the earliest possible stage. Our [Dignity and Respect Policy](#) outlines to report this and the different processes of resolution for staff.

Q: Can I use the changing rooms, showers etc in the campus facilities that match my gender identity/gender expression?

A: Yes, trans staff members are able to use facilities that correspond with their gender identity.

Providing references:

Q: A staff member who has transitioned has asked me to provide a reference?

A: As a line manager if a reference is requested from a current member of staff you must provide the reference as you would for other staff. However, as the referee you must not reveal the individual's trans status and any information must be provided using the gender of the staff member and their current name.

If an external organisation requests a reference for a former member of staff, you should make the request using the prospective employee's correct name and gender since transitioning and should not mention previous names or gender identity.

Conducting University business abroad:

Q: I need to travel abroad for work is there any travel advice I can access?

A: Yes, you can find advice on the travelling abroad for work from the [Foreign and Commonwealth Office](#). You should also contact the University's [International Office](#) who provide information for staff who are travelling abroad to conduct University business. Stonewall also publish [Global Workplace Briefings](#) that you may wish to consult.

Bullying, harassment and victimisation:

Q: If I'm being bullied, harassed or victimisation within the University about my transition or gender identity, who can I talk to and how can I report this formally if I want to?

A: The University takes a zero tolerance approach to all forms of discrimination, bullying and harassment, and violence. All allegations of discrimination, bullying, harassment and violence will be dealt with and the [Dignity and Respect policy](#) sets out what steps you can take to raise concerns informally or by making a formal complaint.

If you wish to raise concerns informally you can contact a [Dignity Champion](#) who can provide confidential and informal advice to those who feel they are experiencing difficult working relationships, including bullying or harassment, or who have witnessed such behaviour. The Dignity Champion may be able to provide more clarity on how your informal concerns can be dealt with. You can also contact the [Trans non-Binary Staff Network](#) for advice and support.

If you would like to make a formal grievance you should initially speak to your line manager or HR Business Partner who will be able to provide you with more details about the grievance procedure.

For Line managers: As a line manager you have a responsibility to ensure that staff are treated with dignity and respect while at work.

If you become aware that your member of staff has experienced, bullying, harassment or victimisation, as their line manager it is important to support and listen to them and discuss with them the different ways in which this can be handled. It is important that they are included in any decision making about how this issue will be dealt with as they must be comfortable with the approach. If a student/supplier/visitor is using inappropriate language you must address this. Sometimes this may be on the spot and other times you may be informed about this and not witness it yourself. If you do not witness it yourself you must speak with your staff member and ask them about this and how they would like you to proceed and ask what support they need. The Transitioning at Work Policy and the [Dignity and Respect policy](#) set out how you should address these issues.

Frequently asked questions for colleagues

Q: A team member has decided to transition-what should I do?

A: In the first instance, you are not required to do anything other than be supportive. If you want to find out more information about transitioning it is best to look at resources from external trans led organisations and charities and training available on LearnUpon such [Diversity in the Workplace](#). You can ask someone questions such as what pronouns they use but you should not ask your colleague questions as a means of educating yourself or that are intrusive or inappropriate.

Q: What does transition mean?

A: Transitioning is the term used to describe the steps a person may take to live as the gender they identify as.

Q: What will happen during the transitioning?

A: Each person's transition is different and will involve different things. For example, it may involve 'coming out' to family, friends and colleagues, changing their name and pronoun and official documents and dressing differently.

Q: My colleague has told me they are non-binary. What does that mean?

A: The term non-binary is an umbrella term for people whose gender identity is outside the traditional binary of man and woman. Non-binary identities are varied and can include people who identify with some aspects of binary identities, while others reject them entirely. Examples of terms people may use to describe their non-binary gender include androgynous, polygender, genderqueer or agender; some people may use no term at all. As non-binary is such a diverse term each individual person will have their own preference for e.g. pronouns and gender expression. It is important to ask the person what name and pronouns they to use, rather than assume.

Q: How do I address my colleague after they have transitioned?

A: That depends on how your colleague has asked to be addressed. If a person has expressed how they would like to be addressed, it is important that they are addressed in that way and you should use their correct name and pronoun. The most common pronouns used are she/her, he/him, and they/them but, there are other pronouns which include (but are not limited to): Ze/hir; Xe/xem; Hy/hym; Co/cos. Some people are happy to use multiple pronouns. People often state their pronoun preferences in their email signature or in their identification for online meetings. If you are unsure of somebody's pronoun preferences, you can respectfully ask them.

Q: What should I do in the event I become aware a student/supplier/visitor is using inappropriate language or behaviour with my trans colleague?

A: If you are witness to this along while your colleague is there it is important to offer support to your colleague without making a decision for them. Your colleague may want to address this with the person using inappropriate language or you may ask your colleague if you can help in any way. It is up to your colleague whether they want to report this to their line manager, and they may ask you to support them as a witness to the incident.

Q: My colleague has informed me of bullying and harassment toward them by another staff member, what should I do?

A: Firstly, it is important to understand from your colleague what they would like to do about this. For example, do they want to report it to their line manager, or would they prefer to speak confidentially with a Dignity Champion? Either way is it important for you to support them and follow their lead in the decision they make.

Annex 1

Transitioning at work plan

Your transition will be led by you and you can decide whether or not to use this plan and how you wish to use it if you do. In opting to use the plan it is recommended that it is reviewed regularly. This may be every three months or more regularly as agreed between the staff member and line manager. The plan provides a template for you and your line manager and sets out key areas relating to transitioning that may be helpful for you and your line manager to discuss and agree actions on. Not all of the actions listed below will be relevant for everybody and you should delete those sections that do not apply. For example, some staff will not be looking to transition at work from a specific date and therefore would not need to agree a timeline.

When you meet with your line manager to discuss your action plan, you can bring somebody to support you if you would like. This could be a colleague, an HRBP/HRBA or your union rep, but you must let your line manager know in advance. Any discussions should be held in confidence and any information, electronic and hard copies, about the meeting including any notes should be stored confidentially and securely. Confidentiality should be maintained at all times. Great care should be taken by your line manager and other staff not to 'out' you or violate your privacy. Information about your transition should not be disclosed to any other/third parties without your expressed permission.

A copy of the completed action plan can be circulated on a confidential basis, only with your consent, to other people present at the meeting to make sure it accurately reflects any actions agreed. The plan should be drafted to show what will happen, who will do it and when.

A. Initial timeline -Do you wish to agree a set date when all of your record changes need to be made?

If you do, you may want to consider the actions in this section. If not, please ignore this part of the checklist.

Actions to be agreed	Actioning Officer	Completion Date
1. A timeline of actions that need to be considered to ensure that all records are changed at the same point if requested.		

Other things to consider:

- If you are working towards a target date then you may want all of your records to be changed by this date. Remember that the work may need to be done by a range of people in different teams and it is unlikely that every change can be made to be effective at exactly the same point. Your plan and agreeing a timeline can help synchronise these changes as much as possible. The more notice teams have the easier it will be to plan the changes to meet your timeline. See section on records below for details of planning the changes you need.

B. Absence and Changes to work patterns – Are you expecting to be absent from work or change your work patter as part of your transition?

If you are, you may want to consider the actions in this section. If not, please ignore this part of the checklist.

Actions to be agreed	Actioning Officer	Completion Date
1. Are there any scheduled appointments you need to attend? Will cover be needed for you during these times?		
2. What future appointments or longer periods of absence may you need? How will you and your line manager plan ahead to support you and cover your work?		
3. Is there any changing to the working pattern required? Is a temporary flexible working arrangement required?		

Other things to consider:

- Do you want a period of absence as part of your transition that you need to discuss with your manager?
- If you would like to temporarily adopt a flexible working pattern as part of your transition this can be discussed informally with your line manager. For a formal permanent change arrangement you should apply using the flexible working procedure.

C. Role specific changes and the working environment

You should think about anything related specifically to your role or where you work that may be affected by your transition or require a change.

Actions to be agreed	Actioning Officer	Completion Date
1. Are there any changes to the job or role required during the transition process? If so, what are these and when do they need to take effect		
2. Are there any workplace adjustments required?		

Other things to consider:

- If your role requires you to have a Disclosure and Barring Service (DBS) check and this needs renewal or a new check, the DBS has a sensitive applications process. More information about this can be found on the DBS website.
- Although there are few posts at the University that need a Genuine Occupational Requirement, if this is relevant to your role and your transition affects this, then you and your line manager need to seek advice from your HRBP.
- Do any workspace changes need to be made? E.g. name plates, floor directories, team photos? You should discuss with your line manager how and when you would like these changes to be made

D. Support – What support do you need during your transition?

Actions to be agreed	Actioning Officer	Completion Date
1. What level of support do you need from your line manager? Agree the frequency and timings of future meetings, check their availability during your transition.		
2. Are there any specific issues that you have already identified where you will need support?		
3. Develop a list of people who you can offer you support if you need it. This might include the LGBT+ Staff Network, the Trans and non-binary Staff Network, HR associate acting as a single point of contact, a designated colleague, a Dignity Champion.		

Other things to consider:

- If your line manager or other key support is unavailable during your transition, who will support you in their absence if required?
- Remember that the support you need may change over time, so it is important to review what support is needed during future meetings.

E. Changes to your records and digital presence at the University - Are you changing your name or title? Do you want your pronouns to change?

There are a wide range of records and digital spaces where information about you is held and displayed

Actions to be agreed	Actioning Officer	Completion Date
1. You need to consider any record that holds your name, title or other information about you. A number of people may need to be involved in making these changes and you should discuss with your line manager which records you want to change yourself or notify relevant staff about and which you want them, your HR Business Associate or somebody else to action for you. You need to give your permission for your line manager or somebody else to act on your behalf.		
2. Work with your line manager to agree a list of the records which need to be changed. Annex 2 will help in doing this. If appropriate agree the date for records to be changed, who needs to be involved and how confidentiality should be considered. Express consent should be sought where confidential information is required to be shared with others.		
3. If you have changed your name or gender identity you will need to consider whether any changes need to be made to internal websites where your name and information about you is referenced, e.g. your biography on School pages and contact lists. You can ask you line manager to support you or act on your behalf to have the changes made.		

Other things to consider

- Names can be changed at any point by contacting HR Business Services.
- While changes can be made on request in relation to name, title and gender marker on most records, the University must record your legal sex on your payroll records. This is because we are required to make a statutory return to HMRC about the legal sex of staff members. To change these records, you will be asked to provide evidence of your legal sex.

F. Communicating with colleagues – Do you want to tell people about your transition?

For some staff this is an important part of their transition but for others it isn't. Only use this section if you want to let people know about your transition

Actions to be agreed	Actioning Officer	Completion Date
1. If you want to inform others about changes to your name and how you would like to be addressed think about who you want to tell and how e.g.: <ul style="list-style-type: none"> • Close colleagues and/or direct reports. • Wider team members or members of staff from other departments whom you work with. • Relevant third parties such as students, grant funding bodies, external clients. 		
2. Do you want your line manager to inform others about changes to your name and how you would like to be addressed rather than do it yourself? Think about who your line manager should tell and how e.g.: <ul style="list-style-type: none"> • agree the specific nature and content of any communications, are they individual or to groups • who would receive the communication • timings especially if you are telling some people yourself • how will the communication be shared (e.g. verbally or by email) 		

Other things to consider

- You may not want to share information with colleagues, students or clients. It is up to you whether you decide to share with others or not.
- Think about the content of these communications. How much do you want people need to know? Should it contain a reminder about dignity and respect and mention specific things colleagues can do to support you?
- In sending out communications it may be the case that there will be queries or questions. Neither you nor your line manager is under any obligation to answer any probing or inappropriate questions. Think about what you are happy to discuss and what you are not in follow up to any communications and consider including that in the communication.

G. Dress code and work wear

Actions to be agreed	Actioning Officer	Completion Date
1. There is no dress code policy for staff at the University. However, there may be some departments that have a uniform or dress code rules due to health and safety. If your department does, then discuss this and whether replacements will need to be ordered.		

H. Use of facilities

Actions to be agreed	Actioning Officer	Completion Date
1. Any concerns about the use of toilet and changing room facilities should be discussed.		

I. Pensions

Actions to be agreed	Actioning Officer	Completion Date
1. Ensure that any implications in respect of the staff member's pension have been discussed.		

Other things to consider

- Very few staff will be affected by differences in state retirement ages for men and women born before a certain date that will affect their pension. However, advice from Pensions may be required and it is important to remember to ensure any name or title and gender identity changes are completed with your current pension provider.

J. Bullying, Harassment and Victimisation

Actions to be agreed	Actioning Officer	Completion Date
1. Discuss any worries or concerns that you have with your line manager and make sure that you are both aware of the University's Dignity and Respect Policy.		

Details of further meetings

Proposed date	Who needs to attend?

Signatures:

Line Manger (print name):

Staff member (print names):

Line Manager (signature):

Employee (signature):

Date:

Date:

Annex 2: Examples of what records may need changed.

The examples provided below are not an exhaustive list of you records as there may be other records that you are aware of that need changing but are not listed.

Your HR Associate will be able to provide support in changing the following records:

HR records, IT credentials and ID Cards	Applicable	Not applicable	Action Officer	Date to be completed
Human Resource records				
Payroll records (via payroll)				
Pension records (via pensions department or pension provider)				
ID and Library Card				
Access pass (building security pass)				
IT accounts/email address/global address list				
HMRC (via payroll)				
Training records				
Bank account details (via payroll)				

There may be a number of records that your School/Division hold. Staff should consult with their line manager to coordinate the changes that need to be changed. These may include:

School/Division Records	Applicable	Not applicable	Action Officer	Date to be completed
Sussex Research Online				
Presence on School/Division's internal and external webpages				
Departmental/School administrative records—staff lists/contacts/organisational charts/leave sheets				
For academic staff: programme and module lists/ prospectuses/School handbooks				
Name badges				
Door plate				
Business cards				
Company photos				
Workplace driver's licence				

Finance related records	Applicable	Not applicable	Action Officer	Date to be completed
Departmental purchasing cards				
Other forms of insurance (e.g. for fieldwork or traveling abroad for work)				

There may be other work-related records that a staff member may need to action to have changed. These could include but are not limited to:

Other Records	Applicable	Not applicable	Action Officer	Date to be completed
Voicemail message				
Standard communications with service users				
Email signature				
Sussex Sport membership records				
Informal and formal networking/social groups/societies/sports clubs				
Professional membership that are linked to the University				
Academic papers ¹				

¹ Academic staff members may wish to have their name changed on publications. Rules around this are set by the individual publishers. Staff should check with the relevant publishers to find out whether this is currently facilitated.